Commonwealth Major IT Project Status Report Dashboard

User Manual

Version 1.1
(For Dashboard Version 1.7.1)

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Introduction

Purpose of the Dashboard

The Commonwealth Major IT Project Status Report Dashboard presents the Secretary of Technology, sponsoring Secretariats, and proponent state agencies with a succinct and timely summary of the status of their major information technology projects. In the Commonwealth of Virginia, major IT projects are those projects exceeding $1 million in estimated total project cost and deemed mission critical, or having enterprise significance.

This Internet accessible system provides decision makers with a visual status indicator, or dashboard, for each major project, along with links to detailed information. The dashboard establishes a common framework for agency staff, Secretariats, and oversight committees to periodically update project activity, monitor progress, and assess risks.

Description of the Dashboard Application

The Dashboard is a web-based application and associated database maintained by the Department of Technology Planning. The application consists of five major sections:

- Homepage: one-stop access to updates, alerts, and schedules regarding the Dashboard.
- Project List: presents the projects a user is authorized to access
- Project Background: displays basic project information
- Status Report List: lists the status reports in chronological order
- Status Report: presents the project status indicators and associated comments
- Detail Status Report: provides additional information relating to the status indicators.

The application provides screens for the entry, approval, and evaluation of monthly status reports.

User Roles

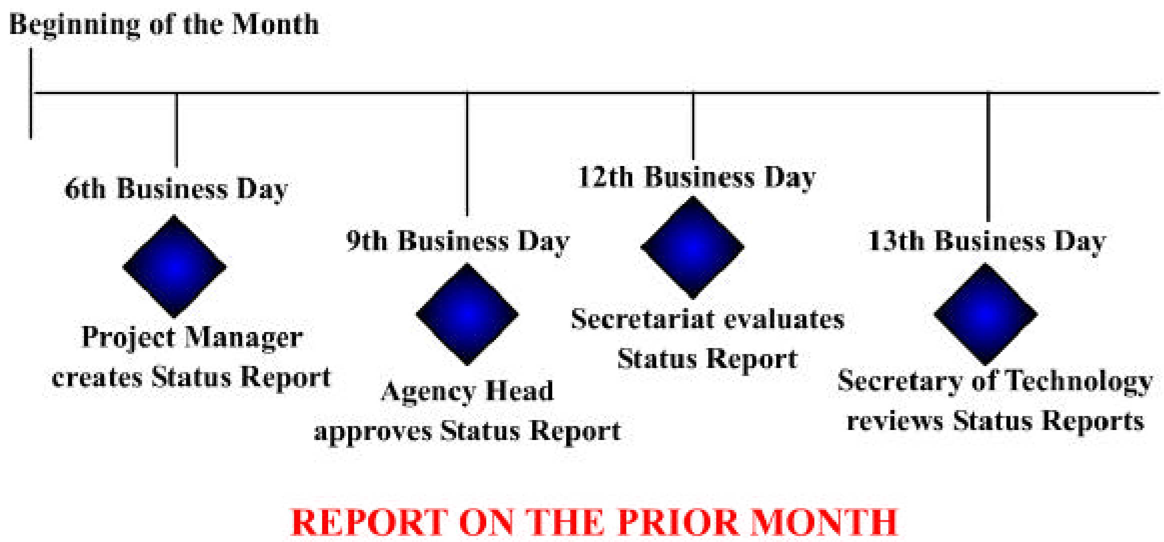
The Dashboard incorporates a multi-level status report creation and approval process. Four roles are defined for Dashboard users:

- Project Manager
    - Agency individual appointed and given responsibility for management of the project.
    - Dashboard role: Create Status Reports, Manage Project Information.

- Agency Viewer
  - Agency CIO or Agency Management that is involved in projects of the Agency.
  - Dashboard Role: View status reports and project background at the agency level.
- Agency Sponsor
  - The agency executive who makes the business case for the project; in effect the “owner” of the project.
  - Dashboard Role: Approve Status Reports.
- Secretary
  - The Secretary that oversees the agency conducting the project.
  - Dashboard role: Evaluate Status Reports.
- Enterprise
  - DTP Staff, Secretary of Technology Staff, or others designated by the Secretary of Technology to view.
  - Dashboard role: View status reports and project background at the Enterprise level.
- Secretary of Technology
  - Required by code to periodically review major IT projects.
  - Dashboard Role: Comment on Status Reports.

Status Reporting Cycle

Status reports are produced at the beginning of each month, based on the previous month’s activity. By the sixth business day of the month, the project manager creates a draft status report. The agency sponsor approves the draft status report by the ninth business day of the month. The Secretary evaluates the approved status report by the 12th business day. On the 13th business day of the month the reports are available to the Secretary of Technology for comment. The status reporting cycle is depicted in the following diagram.

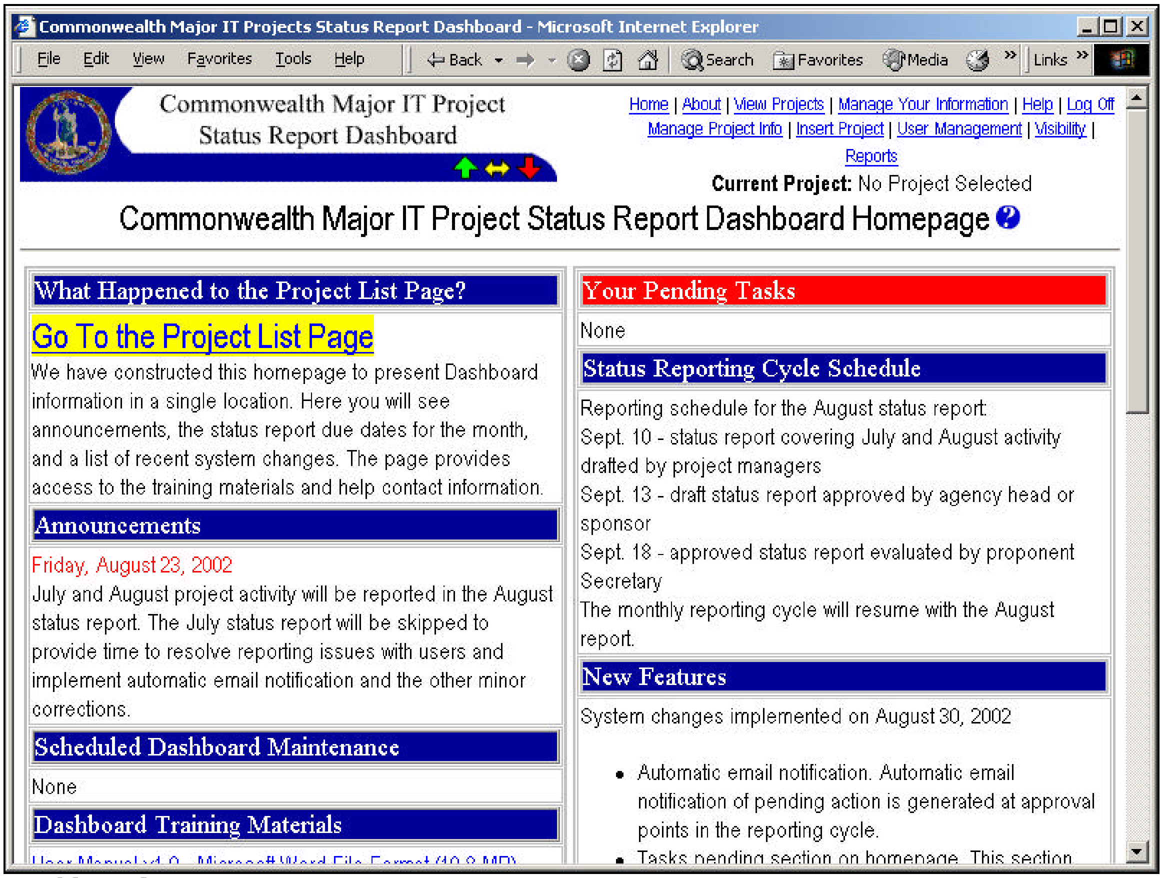


Status Reporting Cycle

The Automatic Email notification system is based upon the Status Report Cycle. See Appendix B for details about the Automatic Email system.

Homepage

The Dashboard Homepage provides one-stop access to pending tasks, new features, reporting schedules, maintenance schedules, and help contact information. Homepage Sections may change over time.



Dashboard Homepage

Your Pending Tasks

The Pending Tasks section is a personalized section to alert the user to tasks awaiting their action. For example, if an Agency Sponsor logs into the Dashboard, and one of the projects under the Agency has a status report that has not been approved; a message stating “1 status report(s) awaiting agency approval for September 2002” will appear in the “Your Pending Tasks” section of the homepage for that Agency Sponsor.

Status Reporting Schedule

The Status Reporting Schedule section displays the reporting schedule for the current month. The schedule changes at the beginning of every month.

Announcements

The Announcements section displays important messages from DTP about the Dashboard.

New Features

The New Features section displays new features implemented recently and pending feature implementations.

Organization of the Common and Role Specific Functions

The remaining two sections of this manual describe the common and role specific functions in the Dashboard. The description of each function contains four parts: Overview, How to Launch the Function, How to perform the Function, and Notes.

Common Functions

Access and Login

- **Overview**

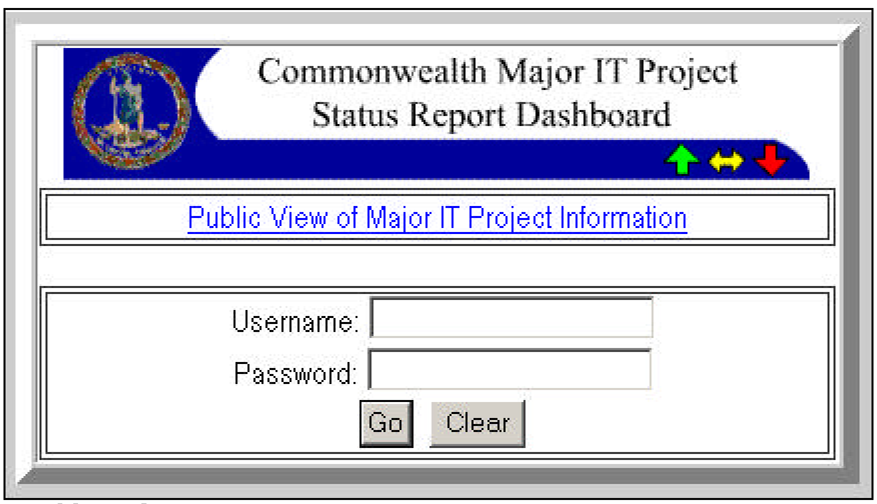
This section describes how to access and login to the Dashboard.

- **How to launch the function**

To access to the Dashboard, point your Web browser to the Department of Technology Planning (DTP) Website at http://www.dtp.state.va.us. In the "What's New" box on the right of the DTP homepage; select the "Status Report Dashboard for IT Projects" link, which takes you to the Dashboard login screen.

- **How to perform the function**

At the Dashboard login screen, enter your user name and password, and then click GO.



Dashboard Login Page

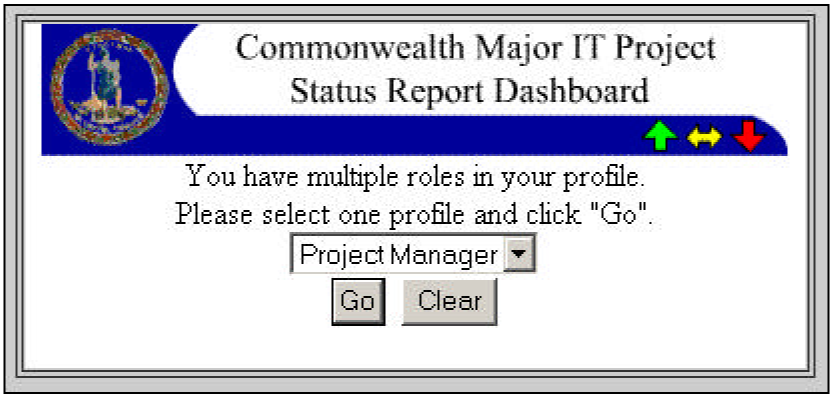
- **Notes**

If the DTP website is unavailable, you can access the Dashboard application on the DTP application server by connecting to http://apps.dtp.state.va.us/Dashboard.

To change your password, see "Managing Personal Information".

Call DTP if you need help logging in, at 804-225-3622.

Your user name may be associated with multiple roles. For example, you may be both the project manager and the agency sponsor for a project. As noted in the Introduction, each role performs different functions. If you are assigned multiple roles, upon login you will be asked to select a role from a drop down box.



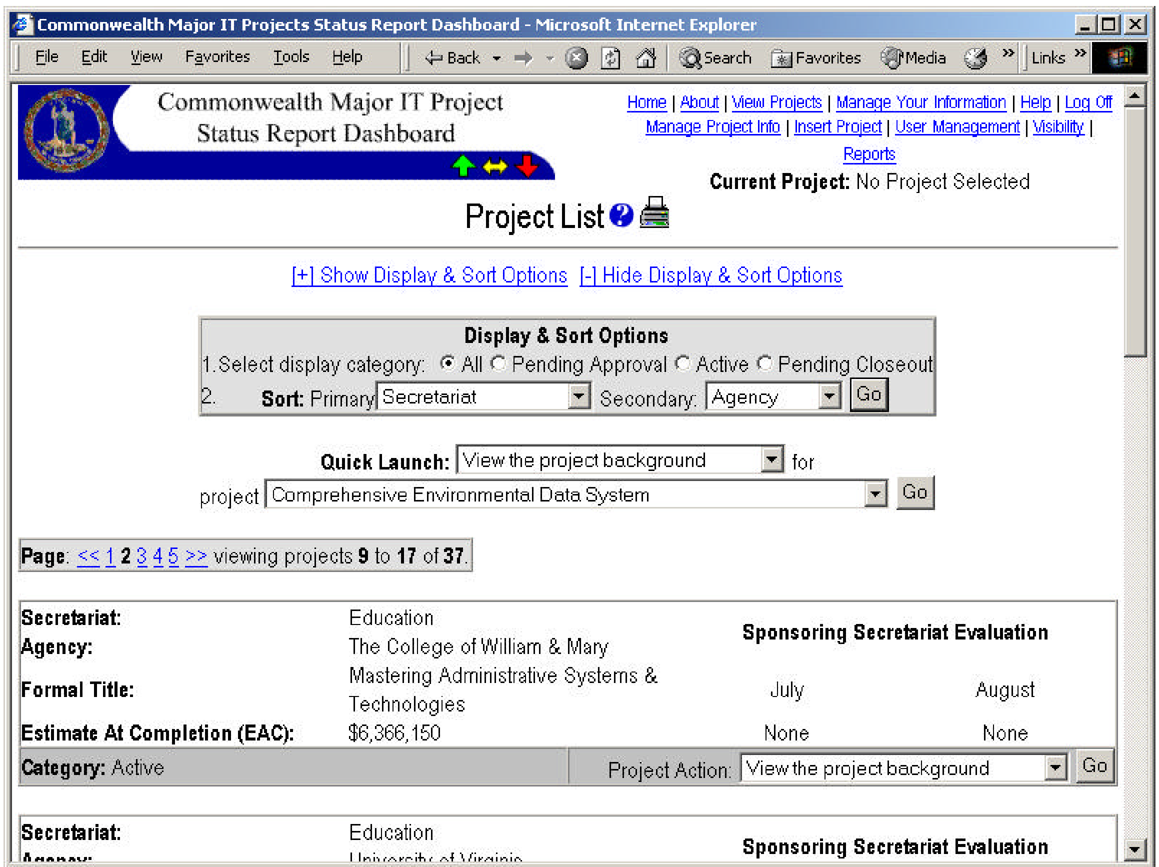
Multiple Role Page

Selecting Projects and Associated Actions

- **Overview**

The Project List page is the starting point for using the Dashboard. Once you have logged in the project list page lists the projects that you are authorized to access and provides key information about each project. If the list contains more than eight projects, the projects are continued on the next page. The list can be sorted in a variety of ways by using the sort options presented in a drop-down box in the upper right of the page. The list can also be changed to display only projects based on display category.

- **How to launch the function**



Project List Page

To Sort the Project List, first choose a display category, and then select a primary sort and/or a secondary sort field from the Sort box in the upper right of the Project List page and click GO.

The Project List page is separated into multiple pages for viewers that have access to over 8 projects. To change pages, click the page number or the double right arrow in the Page box in the upper left.

There are two means to select a project and associated action. You can scroll to a project and select an action from the Project Action drop down list, or select a project and action from the Quick Launch bar.

- **How to perform the function**

  To use the Quick Launch bar:
  - Select a function from the first drop down box
  - Select the project from the second drop down box
  - Click GO

  To use the Project Action box:
  - Scroll or page to the project of interest
  - Select the function from the Project Action drop down box
  - Click GO

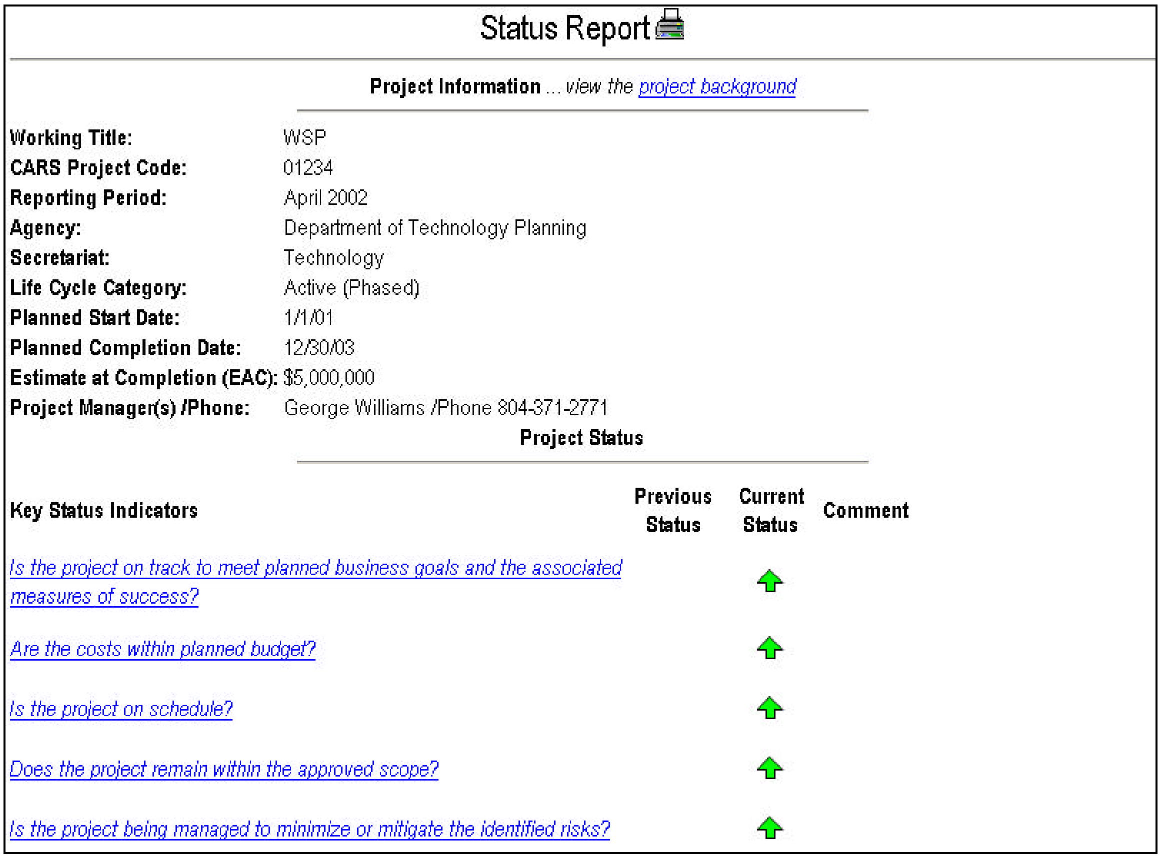
- **Notes**

  The default sort order is alphabetical order by Secretariat, Agency, and Project Title.
  For a primary sort of Estimate At Completion (EAC) or Evaluation, select Default for the Secondary sort.
  A Printer Friendly version of the Project List page is available by clicking the printer icon next to the title of the Project List page.

Viewing Status Reports

- **Overview**

Status reports convey the key status information about a project. The Status Report page presents the status indicators and comments for five key project management measures: performance, cost, schedule, scope, and risk. The page displays the agency, Secretariat, and Secretary of Technology review dates and comments.



Status Report

Project Information ... *view the project background*

Working Title:	WSP
CARS Project Code:	01234
Reporting Period:	April 2002
Agency:	Department of Technology Planning
Secretariat:	Technology
Life Cycle Category:	Active (Phased)
Planned Start Date:	1/1/01
Planned Completion Date:	12/30/03
Estimate at Completion (EAC):	$5,000,000
Project Manager(s) /Phone:	George Williams /Phone 804-371-2771

Project Status

Key Status Indicators	Previous Status	Current Status	Comment
Is the project on track to meet planned business goals and the associated measures of success?			
Are the costs within planned budget?			
Is the project on schedule?			
Does the project remain within the approved scope?			
Is the project being managed to minimize or mitigate the identified risks?			

Status Report Page

- **How to launch the function**

Status Reports are selected from the Project List page.

- **How to perform the function**

To use the Quick Launch bar:

- Select "View Status Reports" from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:

- Scroll or page to the project of interest
- Select “View Status Reports” from the Project Action drop down box
- Click GO

Either action displays the Status Report List page, which provides a chronological list of status reports and their approval status. To display a Status Report, click on the report date in the Reporting Period column.

Status Report List

Reporting Period	Report Creation Date	Draft Complete by Project Manager	Approved by Agency	Evaluated by Proponent Secretariat	Reviewed by Secretary Of Technology
May 2002	May 27, 2002	Yes	Yes	6/3/02	No
June 2002	July 19, 2002	Yes	Yes	8/5/02	No

Status Report List Page

- **Notes**

If evaluated by the sponsoring Secretariat, the status reports for the past two months can be viewed directly by clicking on the evaluation arrow shown on the Project List page.
If a status report has a Microsoft® Project file attached to it, a Microsoft® Project file icon will be displayed.

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Viewing Detail Status Reports

- **Overview**

  Each Key Status Indicator on the Status Report has an associated Detail Status Report that presents additional information and comment.

- **How to launch the function**

  Each Key Status Indicators on the Status Report is linked to an associated Detail Status Report

- **How to perform the function**

  On the Status Report page, click on the Key Status Indicator question to display the associated Detail Status Report.

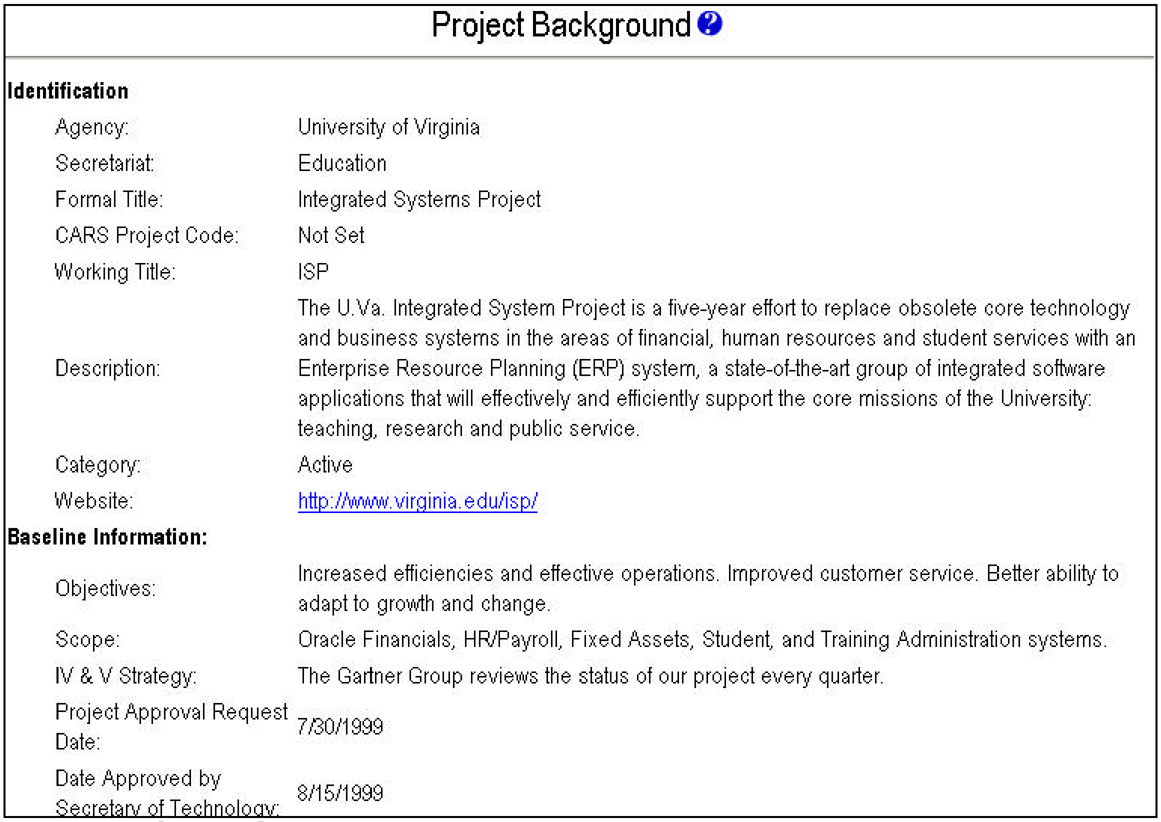
- **Notes**

  You can use the navigation links at the bottom of each Detail Status Report to go to other Detail Status Reports or return to the Status Report.

Viewing Background Information

- **Overview**

The Project Background page describes the project and provides baseline, contractor, contact, and Oversight Committee information.



Project Background

Identification	
Agency:	University of Virginia
Secretariat:	Education
Formal Title:	Integrated Systems Project
CARS Project Code:	Not Set
Working Title:	ISP
Description:	The U.Va. Integrated System Project is a five-year effort to replace obsolete core technology and business systems in the areas of financial, human resources and student services with an Enterprise Resource Planning (ERP) system, a state-of-the-art group of integrated software applications that will effectively and efficiently support the core missions of the University: teaching, research and public service.
Category:	Active
Website:	http://www.virginia.edu/isp/
Baseline Information:	
Objectives:	Increased efficiencies and effective operations. Improved customer service. Better ability to adapt to growth and change.
Scope:	Oracle Financials, HR/Payroll, Fixed Assets, Student, and Training Administration systems.
IV & V Strategy:	The Gartner Group reviews the status of our project every quarter.
Project Approval Request Date:	7/30/1999
Date Approved by Secretary of Technology:	8/15/1999

Project Background Page

- **How to launch the function**

The Project Background page can be selected from the Project List page or the Status Report page.

- **How to perform the function**

To use the Quick Launch bar:

- Select “View the project background” from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:

- Scroll or page to the project of interest
- Select “View the project background” from the Project Action drop down box
- Click GO

From the Status Report page, click the “view project background” link at the top of the Project Information section.

- **Notes**

None

View Status Report History

- **Overview**

The Status Report History report displays the status of a project over a period of time. The report includes the Sponsoring Secretariat Evaluation, and all the rankings for each status indicator question.

- **How to launch the function**

The Status Report History page can be selected from the Project List page.

- **How to perform the function**

To use the Quick Launch bar:

- Select “View Status Report History” from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:

- Scroll or page to the project of interest
- Select “View Status Report History” from the Project Action drop down box
- Click GO

After navigating to the “Status Report History” page, select the beginning date of the report and click the GO button.

Status Report History – Select starting date

Commonwealth Major IT Project Status Report Dashboard
Status Report Timeline
for **Project Title**

Close Window

	February 2002	March 2002	April 2002	May 2002	June 2002	July 2002	August 2002	September 2002	October 2002	November 2002	December 2002	January 2003
Sponsoring Secretariat Evaluation				↑	↑							
Performance				↑	↑							
Cost				↑	↑							
Schedule				↑	↑							
Scope				↑	↑							
Risk				↑	↑							

Status Report History – Status Report History Report

- **Notes**

None

Managing Personal Information

- **Overview**

  The Manage Personal Information page enables you to edit your personal information (name, phone number, and email address) and change your password.

- **How to launch the function**

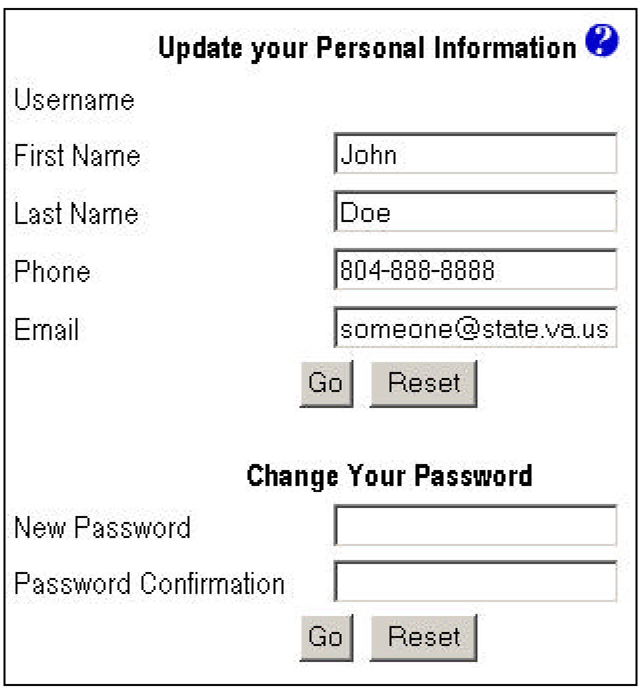
  Click on the “Manage Your Information” link in the navigation bar located at the top and bottom of most pages.

- **How to perform the function**

  To change your personal information, edit the text boxes under the section labeled “Update your Personal Information” and then click GO (below the Email box).

  To change your password enter a new password in the New Password text box, repeat the password entry in the Password Confirmation box to confirm your password, and click GO (below the Password Confirmation box).

  To remove changes prior to clicking GO, click RESET.



Manage Personal Information Page

- **Notes**

  Passwords must be between 4 and 10 alphanumeric characters. Special characters, such as **!@#$%^&*()<>?.,:** can be used, and are encouraged.

Using Online Help

- **Overview**

Online Help is a context sensitive help system that is used to explain functions and help users perform those functions throughout the Dashboard.

- **How to launch the function**

Online Help can be launched two ways. There is a Help link at the top and bottom of most pages. There are question mark icons placed strategically throughout the dashboard for the context sensitive function.

- **How to perform the function**

For general help, use the functions at the top of the help page to select a help category:

  - Overview: Description of the major Dashboard elements
  - Definitions: Definitions of common input format, data elements, and status indicators
  - Actions: Description of the actions that can be performed
  - Show All: List all the help articles in alphabetical order by category

Online Help – Navigation

Context sensitive help displays the definition or action specific to the context.

Online Help – Context Sensitive Help Icon

- **Notes**

The Online Help system is also User-Specific. If you have logged in as a Project Manager, you will not be able see a help article for approving a status report.

Role Specific Functions

Create Status Reports (Project Manager)

- **Overview**

Status reports are created by the project manager through the Status Report Wizard. This seven-step process leads you through a series of metrics and questions to develop a ranking for each of the five project Key Status Indicators (KSI). The definitions of the KSI are provided in Appendix A.

- **How to launch the function**

The create function is selected from either the Quick Launch bar or the Project Action drop down list on the Project List page. The function launches the Status Report Wizard.

- **How to perform the function**

To use the Quick Launch bar:

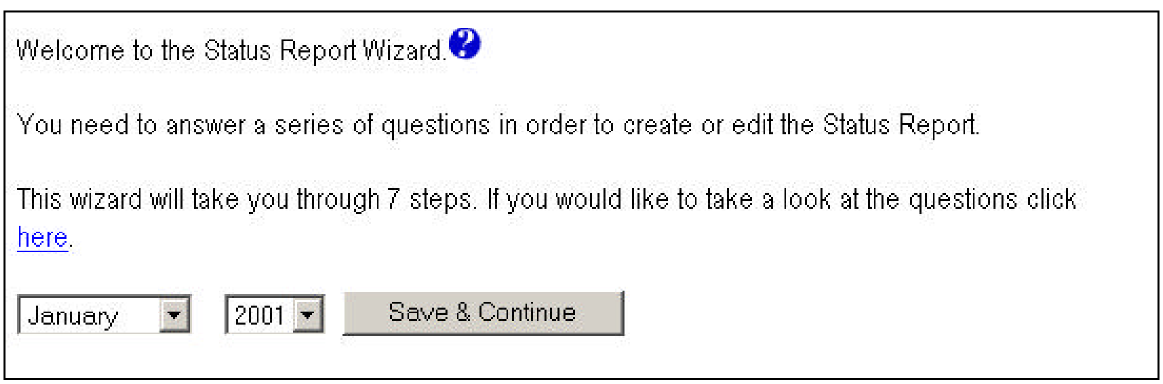
- Select "Create a Status Report" from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:

- Scroll or page to the project of interest
- Select "Create a Status Report" from the Project Action drop down box
- Click GO

Step 1 – Select Report Period

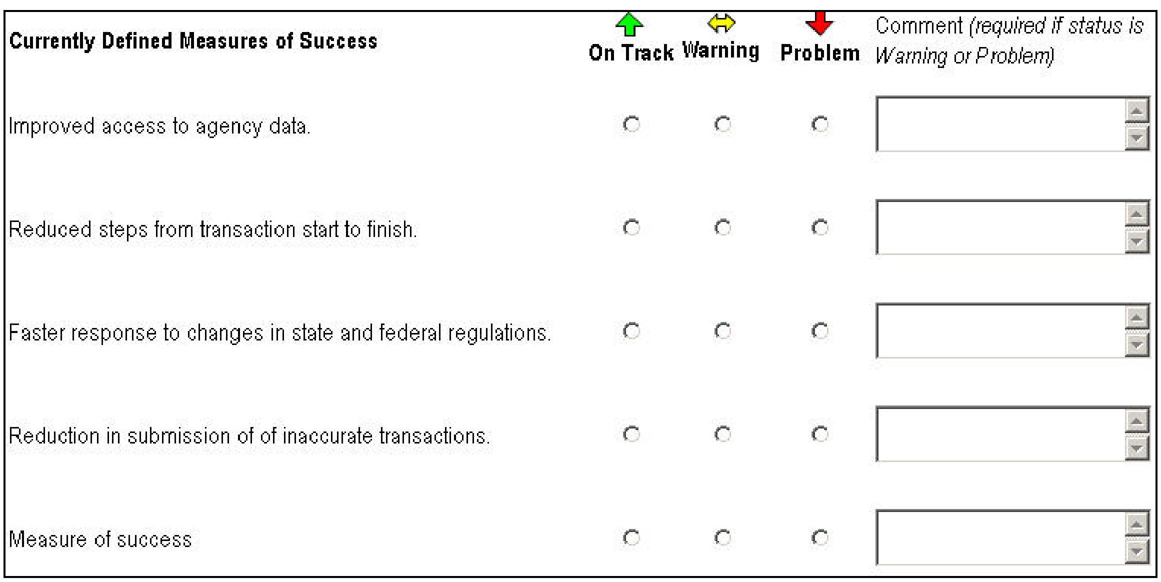
- Select the status report month and year from the drop down boxes
- Click "Save & Continue"



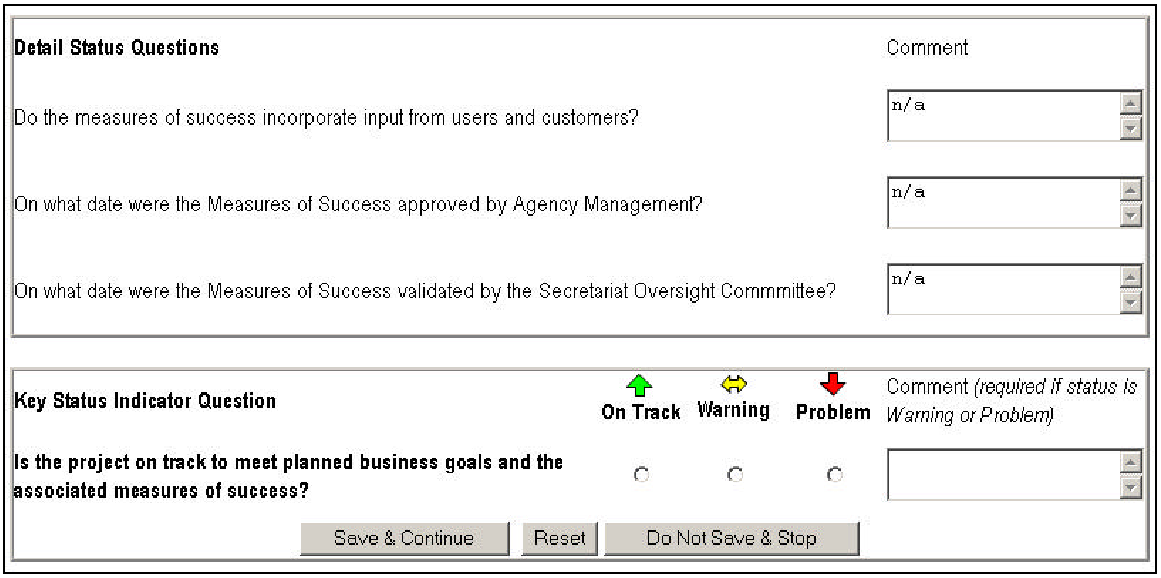
Status Report Wizard Step 1 Page

Step 2 – Rank KSI "Is the project on track to meet the planned performance requirements as reflected in the measures of success?"

- The page displays the current measures of success.
- Click on the button next to each measure of success to indicate progress on meeting the performance measure.
- Provide a comment in the box next to each indicator, up to 400 characters. A comment is required if the indicator is yellow (warning) or red (problem).
- Answer the three Detailed Status Questions if the information displayed is no longer accurate.
- Click the button in the Key Status Indicator Question block that represents your assessment of the project with respect to the KSI.
- Provide a comment in the box next to the indicator, up to 400 characters. A comment is required if the indicator is yellow (warning) or red (problem).
- To continue to the next step, click "Save and Continue"
- To restore the contents of the page to the previous values, click "Reset"
- To exit the Status Report Wizard, click "Do Not Save and Stop". Work on the status report can be resumed by using the "Edit a Status Report" function.



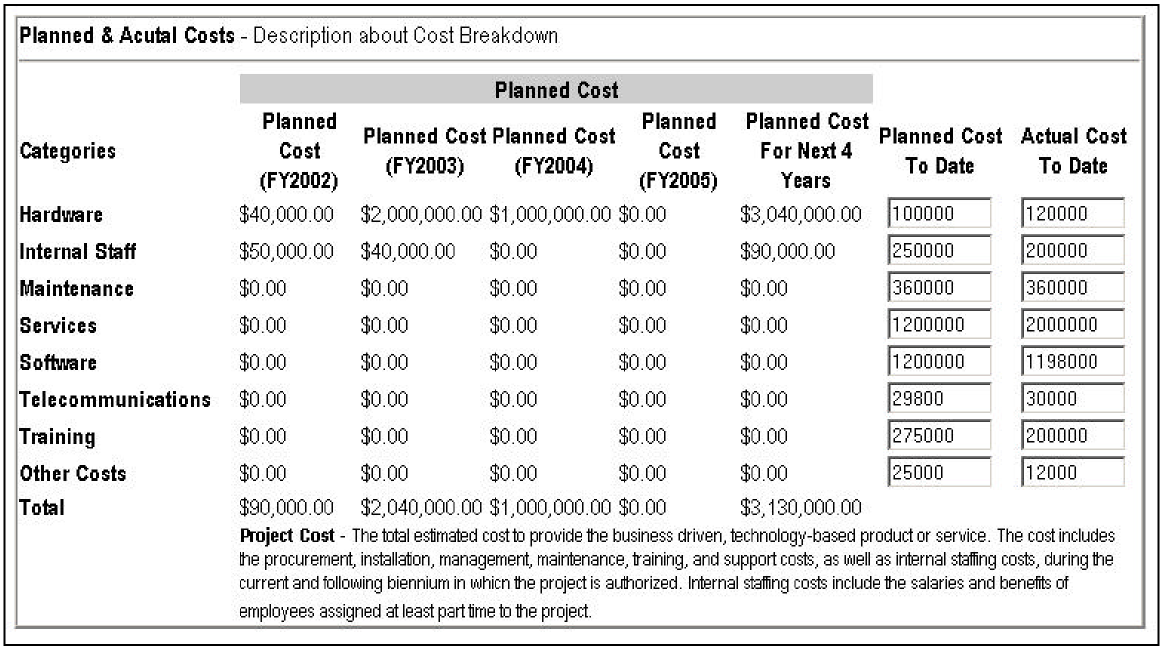
Status Report Wizard Step 2 – Measures of Success



Status Report Wizard Step 2 – Detail Status Questions & Key Status Indicator

Step 3 – Rank KSI "Are the costs within the planned budget?"

- The page displays planned costs as estimated at the start of the project, and the planned and actual costs to date from the last status report.
- Update the cost entries in the Planned Cost to Date and Actual Cost to Date columns. Costs can be entered as numbers or with punctuation ($ xxx,xxx.xx)
- Answer the four Detailed Status Questions if there was a significant unplanned expenditure during the month or if the information displayed is no longer accurate. For the fourth question, enter the date of the last valid cost or budget report.
- Click the button in the Key Status Indicator Question block that represents your assessment of the project with respect to the KSI.
- Provide a comment in the box next to the indicator, up to 400 characters. A comment is required if the indicator is yellow (warning) or red (problem).
- To continue to the next step, click "Save and Continue"
- To restore the contents of the page to the previous values, click "Reset"
- To exit the Status Report Wizard, click "Do Not Save and Stop". Work on the status report can be resumed by using the "Edit a Status Report" function.

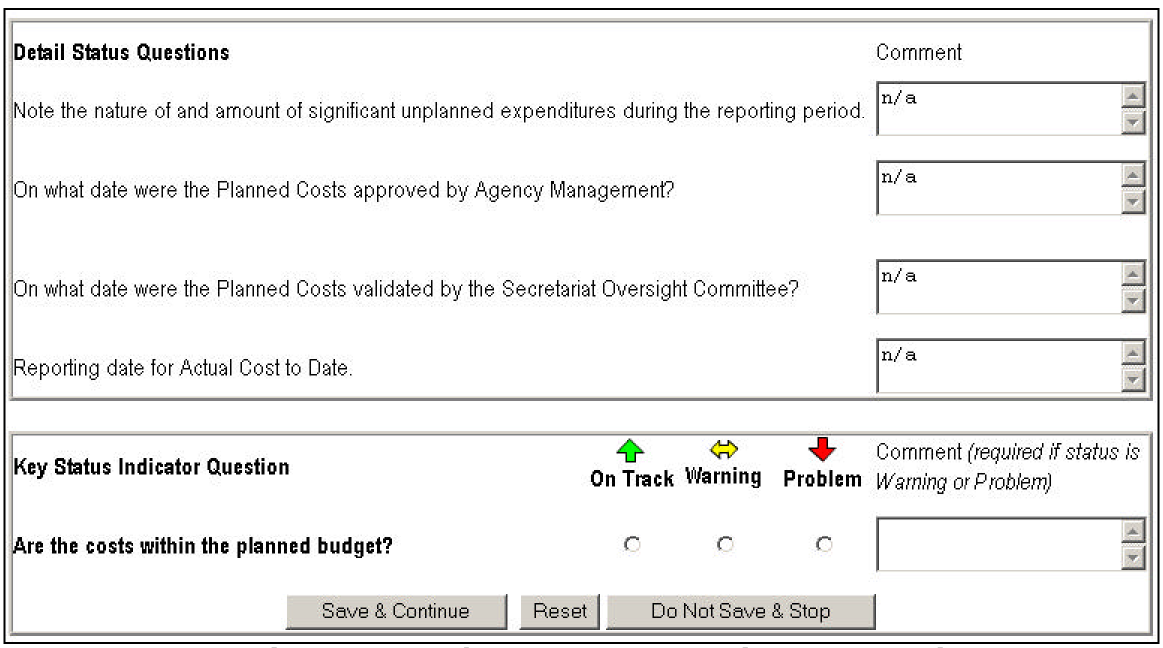


Planned & Acutal Costs - Description about Cost Breakdown

Categories	Planned Cost					Planned Cost To Date	Actual Cost To Date
	Planned Cost (FY2002)	Planned Cost (FY2003)	Planned Cost (FY2004)	Planned Cost (FY2005)	Planned Cost For Next 4 Years		
Hardware	$40,000.00	$2,000,000.00	$1,000,000.00	$0.00	$3,040,000.00	100000	120000
Internal Staff	$50,000.00	$40,000.00	$0.00	$0.00	$90,000.00	250000	200000
Maintenance	$0.00	$0.00	$0.00	$0.00	$0.00	360000	360000
Services	$0.00	$0.00	$0.00	$0.00	$0.00	1200000	2000000
Software	$0.00	$0.00	$0.00	$0.00	$0.00	1200000	1198000
Telecommunications	$0.00	$0.00	$0.00	$0.00	$0.00	29800	30000
Training	$0.00	$0.00	$0.00	$0.00	$0.00	275000	200000
Other Costs	$0.00	$0.00	$0.00	$0.00	$0.00	25000	12000
Total	$90,000.00	$2,040,000.00	$1,000,000.00	$0.00	$3,130,000.00		

Project Cost - The total estimated cost to provide the business driven, technology-based product or service. The cost includes the procurement, installation, management, maintenance, training, and support costs, as well as internal staffing costs, during the current and following biennium in which the project is authorized. Internal staffing costs include the salaries and benefits of employees assigned at least part time to the project.

Status Report Wizard Step 3 – Planned & Actual Costs



Detail Status Questions	Comment
Note the nature of and amount of significant unplanned expenditures during the reporting period.	n/a
On what date were the Planned Costs approved by Agency Management?	n/a
On what date were the Planned Costs validated by the Secretariat Oversight Committee?	n/a
Reporting date for Actual Cost to Date.	n/a

Key Status Indicator Question	On Track	Warning	Problem	Comment *(required if status is Warning or Problem)*
Are the costs within the planned budget?	○	○	○	

Save & Continue | Reset | Do Not Save & Stop

Status Report Wizard Step 3 - Detail Status Questions and Key Status Indicator

Step 4 – Rank KSI "Is the project on schedule?"

- The page displays the schedule milestones in two sections, Baseline Indenture Level-1 Milestones approved by the Oversight Committee and Significant Indenture Level-2 Milestones for the Next Six Months.
- To update baseline milestones:
  - Baseline milestones and Approved Planned Completion Dates cannot be changed within a status report. If a milestone planned completion date has changed from the approved date, enter the

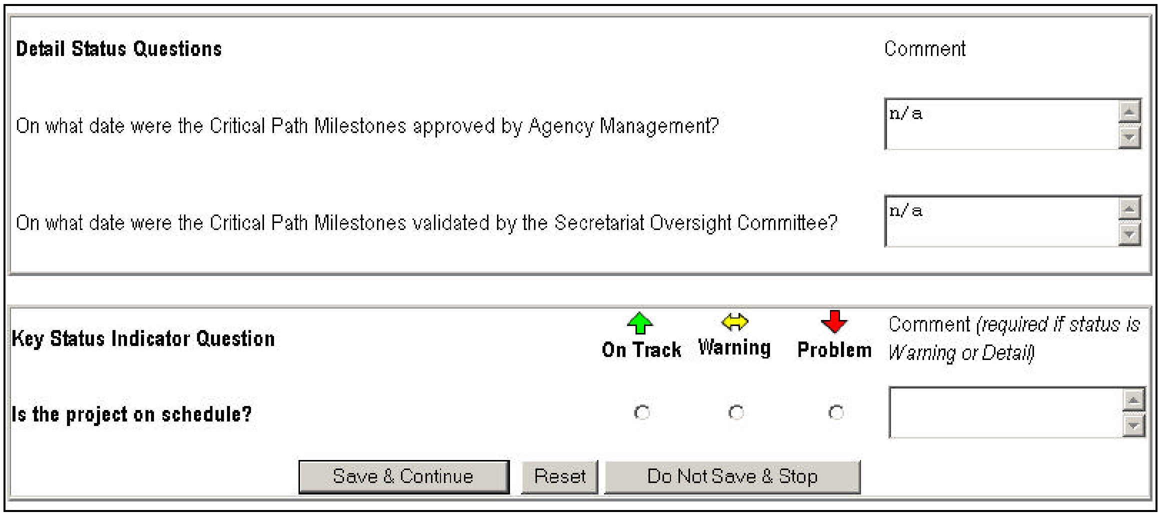
    current planned completion date in the appropriate box and provide a comment.
  - If a milestone has been completed, note the actual completion date in the appropriate box and provide optional comment.
- To update significant milestones for the coming six months:
  - Enter completion dates and optional comments for milestones completed during the reporting period.
  - Delete or replace milestones completed in previous reporting periods.
  - Add new milestones and current planned completion dates for the coming six months.
- Answer the two Detailed Status Questions if the information displayed is no longer accurate.
- Click the button in the Key Status Indicator Question block that represents your assessment of the project with respect to the KSI.
- Provide a comment in the box next to the indicator, up to 400 characters. A comment is required if the indicator is yellow (warning) or red (problem).
- To continue to the next step, click “Save and Continue”
- To restore the contents of the page to the previous values, click “Reset”.
- To exit the Status Report Wizard, click “Do Not Save and Stop”. Work on the status report can be resumed by using the “Edit a Status Report” function.

Baseline Indenture Level-1 Milestones (Approved by the Oversight Committee)				
Milestone Description	**Approved Planned Completion Date**	**Current Planned Completion Date**	**Actual Completion Date**	**Comment**
Initial development of software configuration files	10/1/02			
Follow-up meeting - Region 1 (Salem District) - PE Division	10/1/02			
Follow-up meeting - Region 2 (Fredericksburg District) - PE Division	10/2/02			
Follow-up meeting - Region 3 (Richmond District) - PE Division	10/3/02			
Follow-up meeting - Region 1 (Salem District) - Road Design	10/8/02			
Follow-up meeting - Region 2 (Fredericksburg District) - Road Design	10/10/02			
Follow-up meeting - Region 3 (Richmond District) - Road Design	10/15/02			
Test conversion of IGrds Project data to GEOPAK	11/12/02			
Finalize development of software configuration files	11/12/02			
UAT of software configuration files	12/10/02			
Acceptance of Custom Training Manuals	2/11/03			
Project Completion Date	4/5/05			

Status Report Wizard Step 4 – Baseline Indenture Level-1 Milestones

Significant Indenture Level-2 Milestones for Next Six Months			
Milestone Description	**Current Planned Completion Date**	**Actual Completion Date**	**Comment**
Milestone 1	3/5/2002	4/20/2002	Test
Milestone 2	3/20/2002	3/20/2002	
Milestone 3	3/25/2002	4/5/2002	Comment

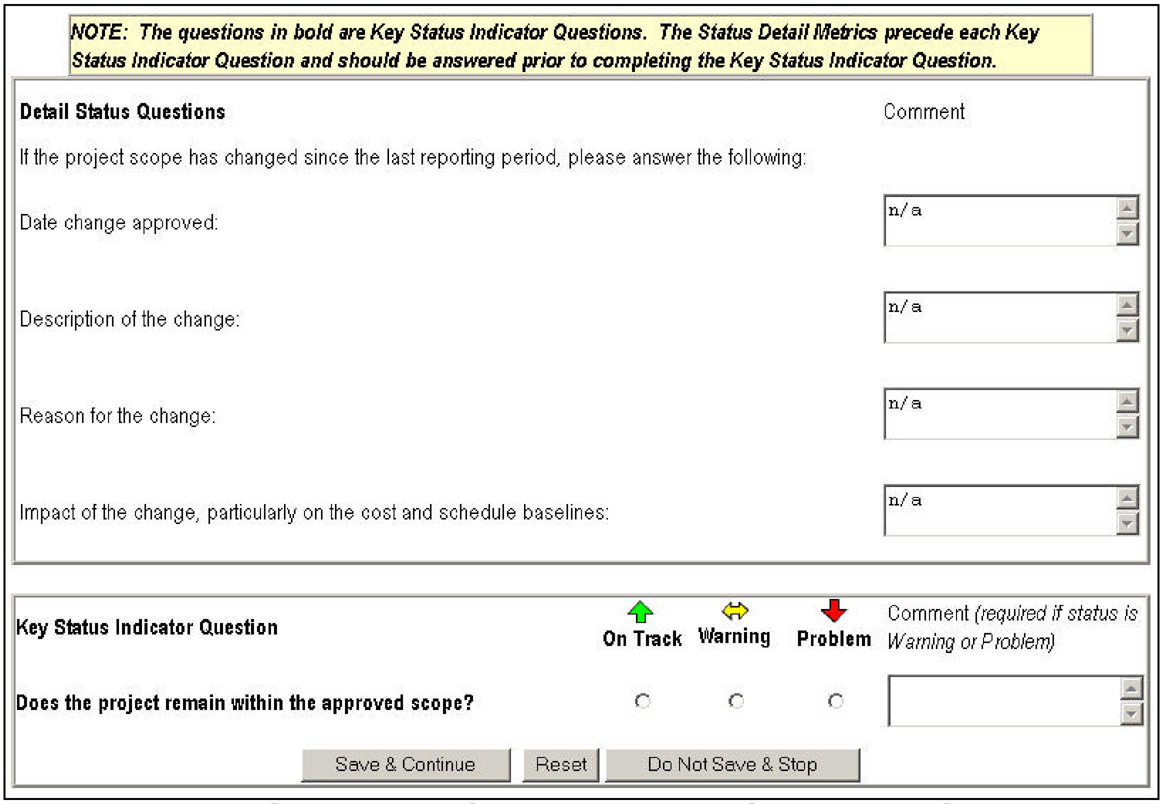
Status Report Wizard Step 4 – Significant Indenture Level-2 Milestones



Status Report Wizard Step 4 – Detail Status Questions and Key Status Indicator

Step 5 – Rank KSI "Does the project remain within the approved scope?"

- Answer the questions in this step only if there has been a significant change in the project scope since the last status report. If the project remains within the approved scope:
  - Scroll to the bottom of the page
  - Click the "On Track" button
  - Click "Save & Continue"
- If there has been a change in the approved scope:
  - State the date the change was approved.
  - Enter a description of the scope change, up to 400 characters.
  - Summarize the reason for the change, up to 400 characters.
  - Note the impact of the change, up to 400 characters.
- Click the button in the Key Status Indicator Question block that represents your assessment of the project with respect to the KSI.
- Provide a comment in the box next to the indicator, up to 400 characters. A comment is required if the indicator is yellow (warning) or red (problem).
- To continue to the next step, click "Save and Continue"
- To restore the contents of the page to the previous values, click "Reset".
- To exit the Status Report Wizard, click "Do Not Save and Stop". Work on the status report can be resumed by using the "Edit a Status Report" function.

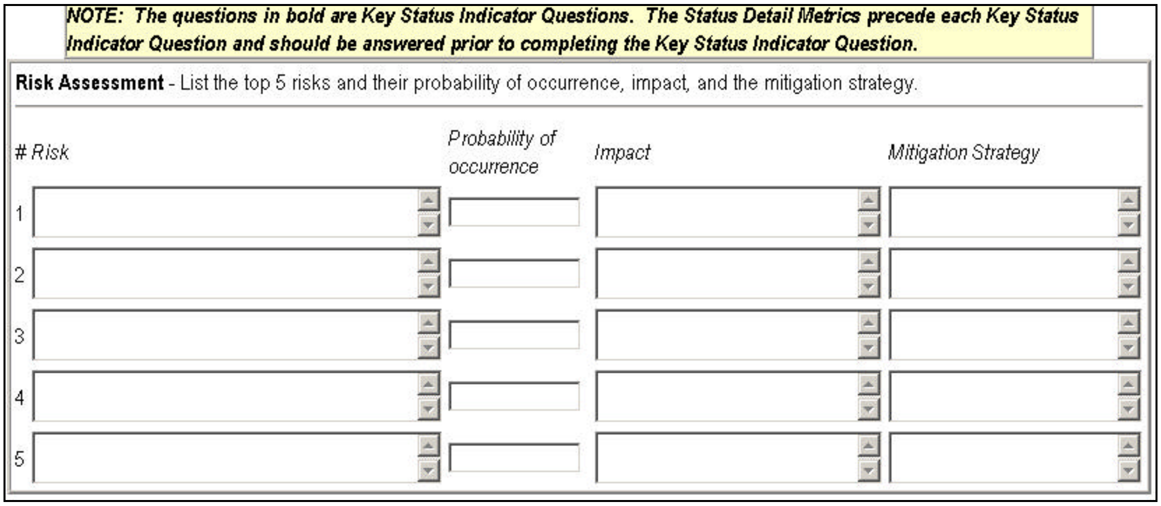


Status Report Wizard Step 5 – Detail Status Questions and Key Status Indicator

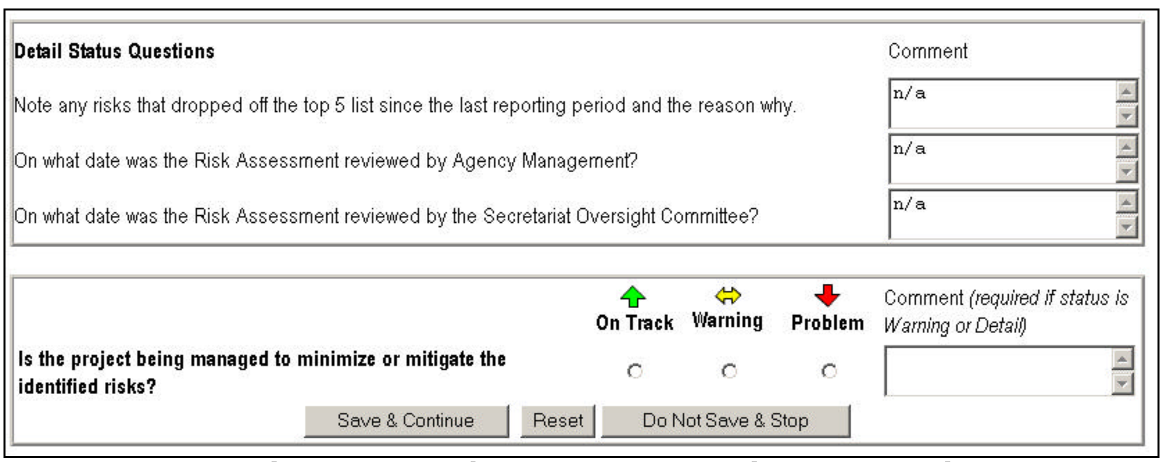
Step 6 – Rank KSI "Is the project being managed to minimize or mitigate the identified risks?"

- The page displays the top five risks reported in the last status report.
- To update the probability of occurrence for a risk, enter the new value, in percent form, in the second column. If the risk has materialized, enter 100%.
- To add or replace a risk:
  - In the first column, enter a description of the risk, up to 300 characters.
  - In the second column, enter the probability that the risk will occur, in percent form.
  - In the third column, describe the impact on the project if the risk materializes, up to 300 characters.
  - In the fourth column, note the mitigation strategies to be employed if the risk materializes. Up to 400 characters.
- In the Detail Status Questions, note the risks that dropped off the top five list and state the reason why; 400 character limit. Answer the two questions if the information displayed is no longer accurate
- Click the button in the Key Status Indicator Question block that represents your assessment of the project with respect to the KSI.
- Provide a comment in the box next to the indicator, up to 400 characters. A comment is required if the indicator is yellow (warning) or red (problem).

- To continue to the next step, click "Save and Continue"
- To restore the contents of the page to the previous values, click "Reset".
- To exit the Status Report Wizard, click "Do Not Save and Stop". Work on the status report can be resumed by using the "Edit a Status Report" function



Status Report Wizard Step 6 - Risk Assessment



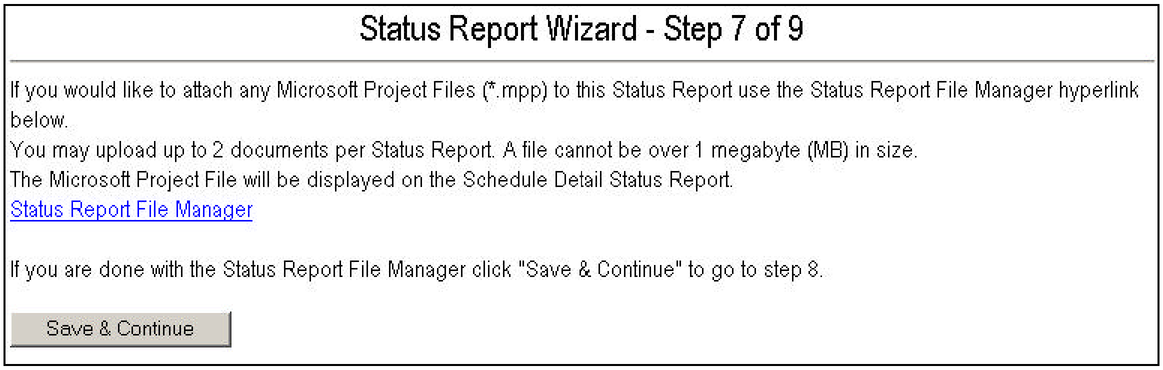
Status Report Wizard Step 6 – Detail Status Questions and Key Status Indicator

Step 7 – Step 7 gives the ability to attach a Microsoft® Project file to the status report. If a Microsoft® Project file is attached the Microsoft® Project file icon will be displayed at the bottom of the Schedule Detail Status Report.

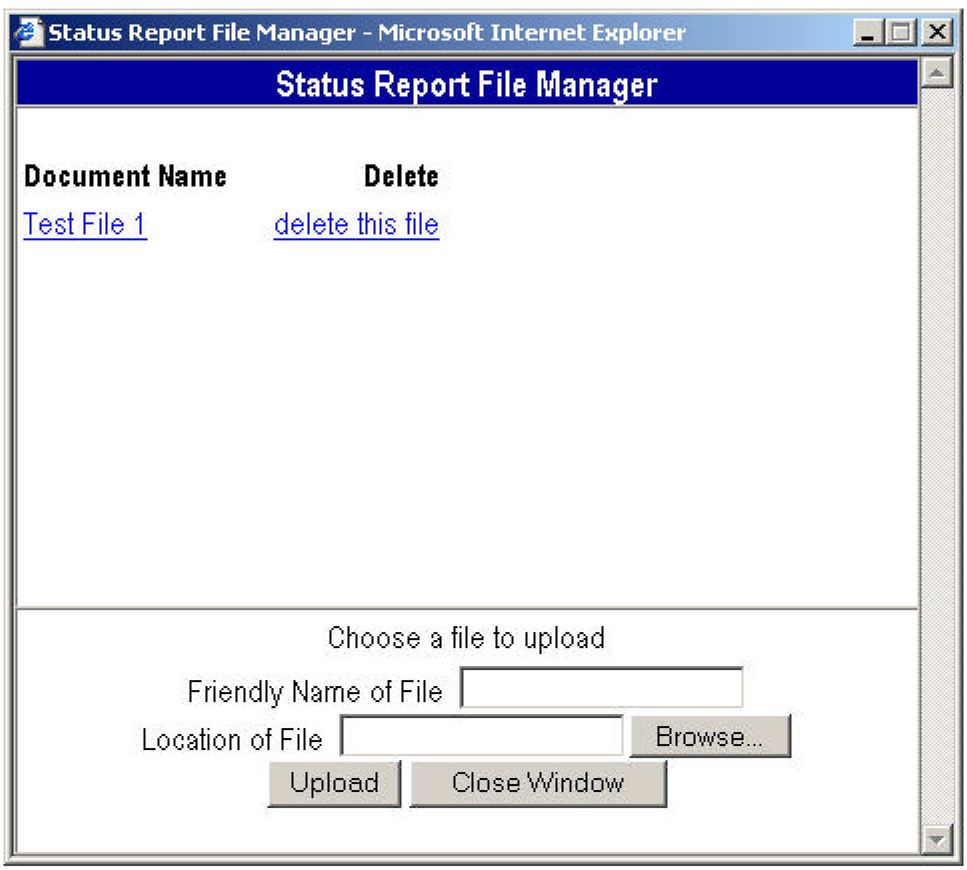
To upload a file click the hyperlink labeled "Status Report File Manager". Input a friendly name for the file that will be displayed on the Status Report page. Click the browse button to locate the Microsoft Project file you would like to upload. After selected the Microsoft Project file click the "OK" button, then click the

“Upload” button. A message will be displayed stating the file has been uploaded successfully.

To delete an uploaded file click the hyperlink labeled “Status Report File Manager”. Click the hyperlink labeled “delete this file” for the file you would like to delete. A message will be displayed stating that the file has been deleted successfully.

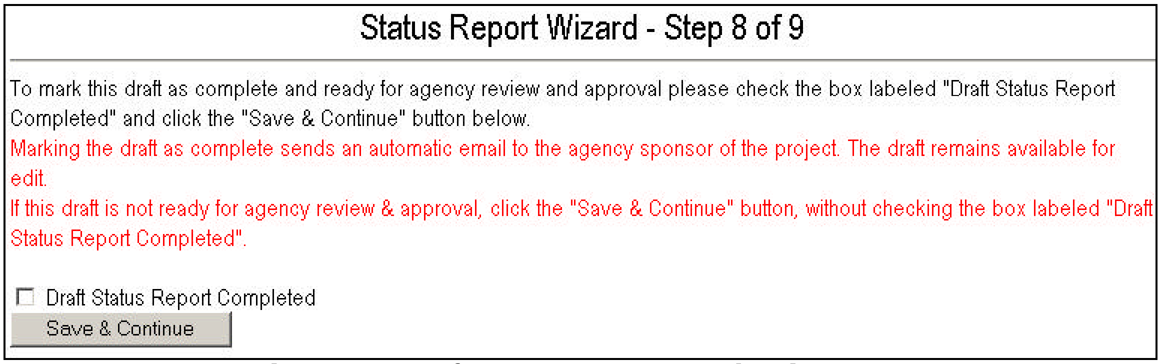


Status Report Wizard Step 7 – Upload Microsoft â Project files



Status Report Wizard – Status Report File Manager

Step 8 – Step 8 allows the Project Manager to mark the report as complete. Marking the status report complete sends a pre-formatted email to the agency Sponsor/Head listed in the project background.



Status Report Wizard Step 9 – Draft Status Report Completed

Step 9 – Step 9 confirms completion of the Status Report. You can choose to view the status report or return to the project list.

- **Notes**

When creating a status report, if there is an agency approved status report within the last six months, an intermediate step will be displayed between steps 1 & 2 of the Status Report Wizard, enabling the project manager to copy the pertinent baseline data into the draft report.
A status report has a limit of 2 Microsoft® Project files that can be attached.

Edit Status Reports (Project Manager)

- **Overview**

A draft status report that has not been approved by the agency sponsor can be edited through the Status Report Wizard.

- **How to launch the function**

The edit function is selected from either the Quick Launch bar or the Project Action drop down list on the Project List page. Selecting the Edit a Status Report function launches the Status Report Wizard. After selecting the report to edit, the Status Report Wizard presents each page of the selected report for editing. For a detailed description of the Status Report Wizard, see the section Create a Status Report.

- **How to perform the function**

To use the Quick Launch bar:
  - Select “Edit a Status Report” from the first drop down box
  - Select the project from the second drop down box
  - Click GO

To use the Project Action box:
  - Scroll or page to the project of interest
  - Select “Edit a Status Report” from the Project Action drop down box
  - Click GO

Step 1 – Select the draft report to be edited
  - Identify the draft report by selecting the month and year from the drop down boxes.
  - Click “Save & Continue”

Steps 2 – 9
  - Follow the actions described in the Create a Status Report section, editing the information presented as required.

- **Notes**

Only draft status reports can be edited. Once the agency sponsor approves a status report, it cannot be altered.

Delete Status Reports (Project Manager)

- **Overview**

A draft status report that has not been approved by the agency sponsor can be deleted and removed from the Status Report List.

- **How to launch the function**

The delete function is selected from either the Quick Launch bar or the Project Action drop down list on the Project List page. After selecting the report to delete from the Status Report List page, you are asked to confirm the deletion.

- **How to perform the function**

To use the Quick Launch bar:
- Select "Delete a Status Report" from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:
- Scroll or page to the project of interest
- Select "Delete a Status Report" from the Project Action drop down box
- Click GO

Either action displays the Status Report List page, which provides a chronological list of status reports. To delete a draft status report:
- Click on the report date in the Reporting Period column
- Respond to the delete confirmation by clicking YES

- **Notes**

Only draft status reports can be deleted. Once the agency sponsor approves a status report, it cannot be deleted.

Manage Oversight Information (Project Manager)

- **Overview**

  This function enables the project manager to maintain information related to the Oversight Committee, including meeting dates and the chair of the Committee.

- **How to launch the function**

  This function is selected from either the Quick Launch bar or the Project Action drop down list on the Project List page.

  There are two parts to managing Oversight Information. You can manage the meetings or the Oversight Chair Personal Information. To manage meetings click on the link labeled “Manage Oversight Committee Meetings”. To manage Oversight Committee Chair Information click on the link labeled “Update Oversight Committee Chair Information”.

Manage Oversight Committee Information Page

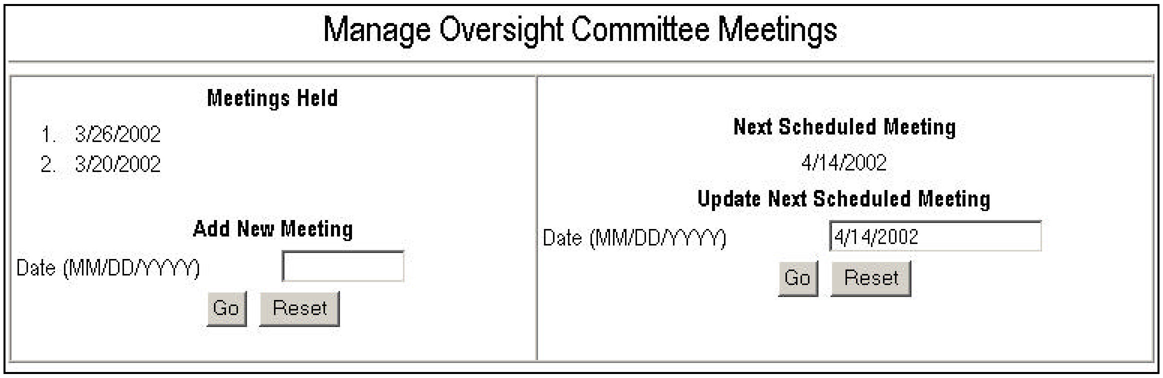
- **How to perform the function**

  To use the Quick Launch bar:
  - Select “Manage Oversight Information” from the first drop down box
  - Select the project from the second drop down box
  - Click GO

  To use the Project Action box:
  - Scroll or page to the project of interest
  - Select “Manage Oversight Information” from the Project Action drop down box
  - Click GO

To manage Oversight Committee meeting dates:

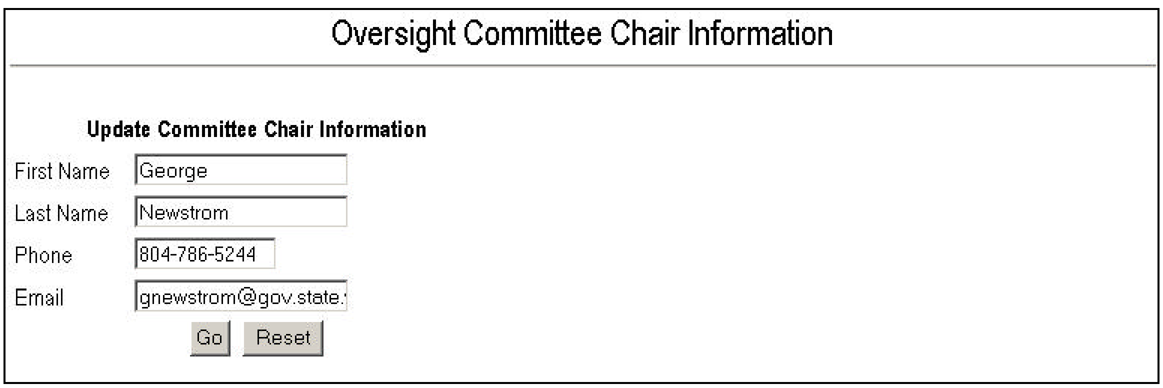
- Click the "Manage Oversight Committee Meetings" link
- To enter a meeting date, enter the date in the box labeled "Add New Meeting" and click GO



Oversight Committee Meetings Page

To update the Oversight Committee chair information:

- Click the "Update Oversight Committee Chair Information" link
- Modify the fields necessary to make the change
- Click GO



Oversight Committee Chair Information Page

- **Notes**

  None

Manage Contractor Information (Project Manager)

- **Overview**

The Dashboard allows project managers to enter in one primary and two secondary contractors and contract values for each project.

- **How to launch the function**

This function is selected from either the Quick Launch bar or the Project Action drop down list on the Project List page.

- **How to perform the function**

To use the Quick Launch bar:

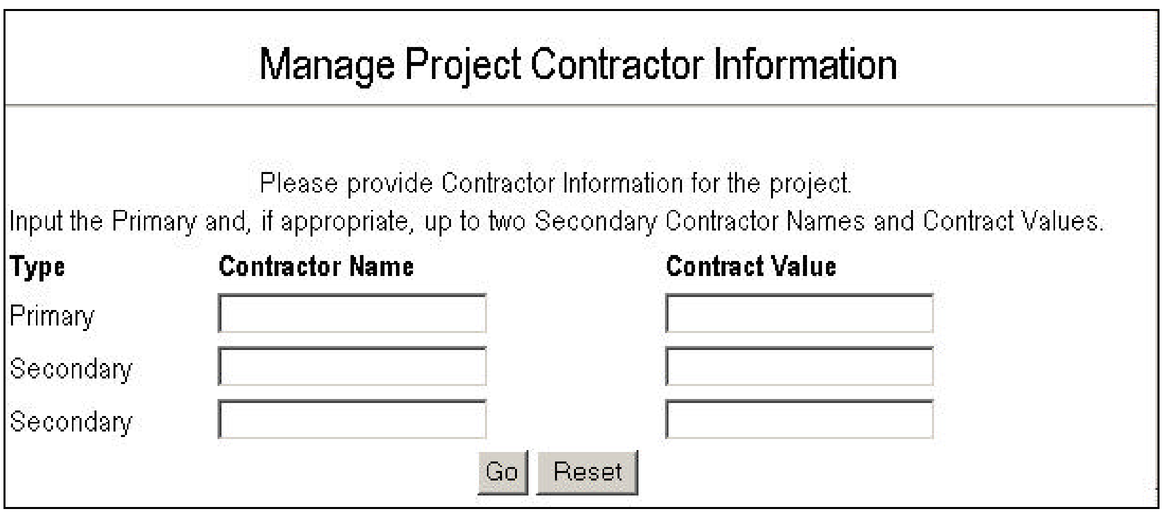
- Select “Manage Contractor Information” from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:

- Scroll or page to the project of interest
- Select “Manage Contractor Information” from the Project Action drop down box
- Click GO

To add or modify contractor information:

- Enter in the name of the contractor in the Contractor Name filed
- Enter the value of the contract in the Contract Value field
- Click GO



Manage Project Contractor Information Page

- **Notes**

  The contractor name cannot exceed 50 characters.

Approve a Status Report (Agency Sponsor)

- **Overview**

The Agency sponsor approves the draft status report created by the project manager. Once approved, the approval date and any comment are displayed in the Project Oversight section of the status report.

- **How to launch the function**

This function is selected from either the Quick Launch bar or the Project Action drop down list on the Project List page.

- **How to perform the function**

To use the Quick Launch bar:

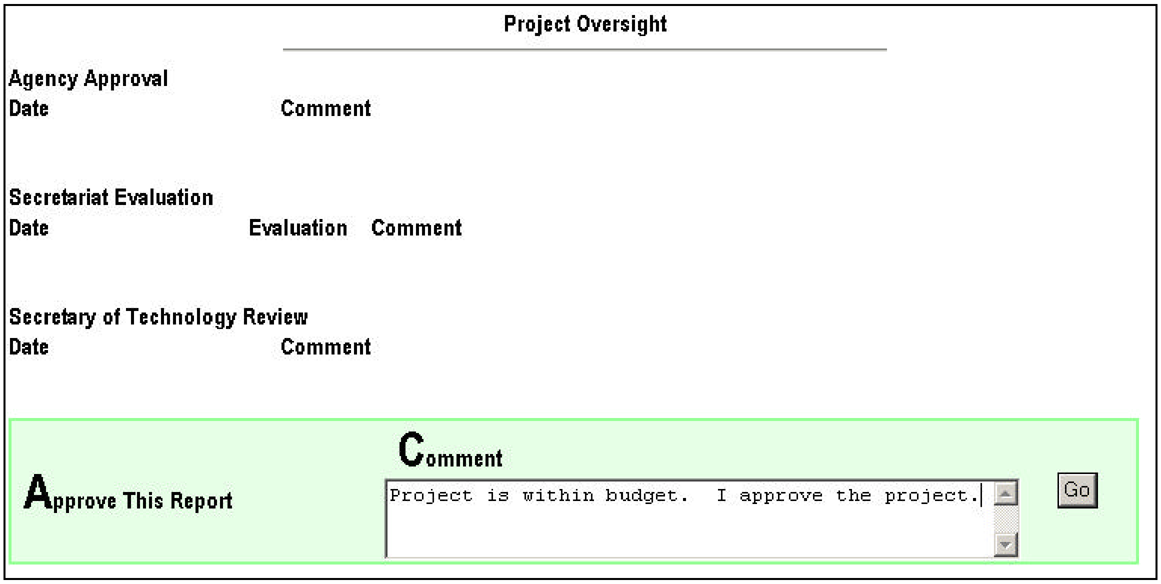
- Select "Approve Status Report" from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:

- Scroll or page to the project of interest
- Select "Approve Status Report" from the Project Action drop down box
- Click GO

From the Status Report List page, under the Reporting Period column, click the status report you want to approve, typically the most recently dated entry.

Scroll to the bottom of the Status Report page. Input a comment for the Status Report and click the "Go" button.



Status Report Page

- **Notes**

The approval comment cannot exceed 3000 characters.
Once the Agency approves the status report, the report can no longer be changed or edited.
Also once the Agency approves the status report, an automatic email goes to the Oversight Chair (Sponsoring Secretariat) of the project stating that the status report has been approved.

Evaluate a Status Report (Secretary)

- **Overview**

The Secretary or assigned Deputy Secretary of the sponsoring Secretariat evaluates status reports approved by the agency sponsor. Once evaluated, the evaluation date, overall project evaluation indicator, and any comment are displayed in the Project Oversight section of the status report. The overall evaluation indicator for the previous two status reports is also displayed in the Project List page.

- **How to launch the function**

This function is selected from either the Quick Launch bar or the Project Action drop down list on the Project List page.

- **How to perform the function**

To use the Quick Launch bar:

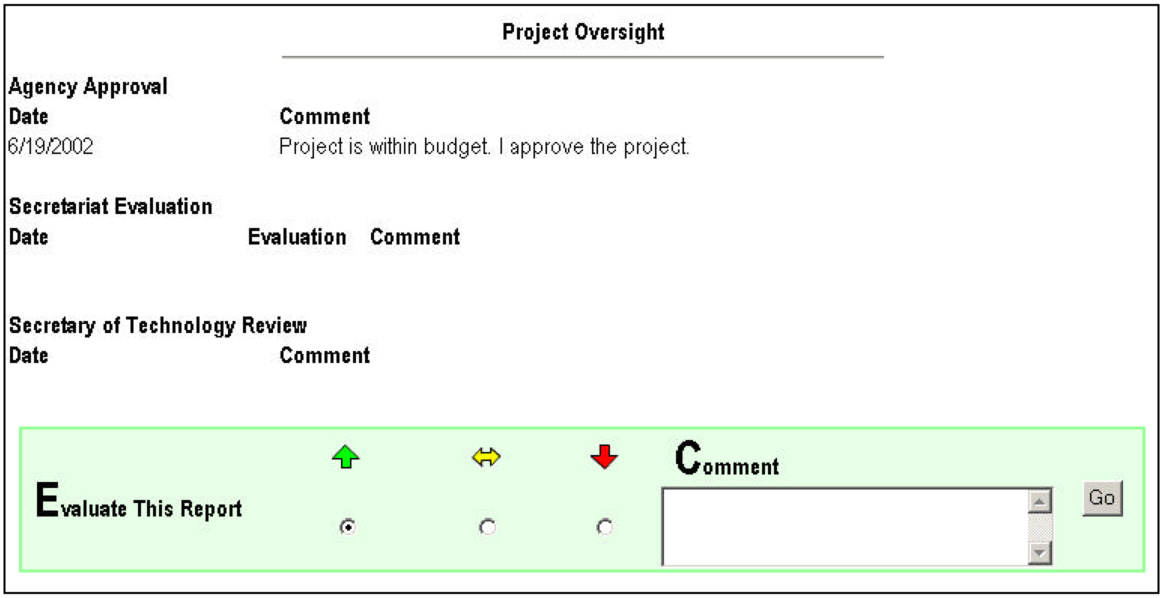
- Select "Evaluate a Status Report" from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:

- Scroll or page to the project of interest
- Select "Evaluate a Status Report" from the Project Action drop down box
- Click GO

From the Status Report List page, under the Reporting Period column, click the status report you want to evaluate, typically the most recently dated entry.

Scroll to the bottom of the Status Report page. Click the button of the indicator that corresponds to your overall evaluation of the project and, if desired, enter a comment. Click the "Go" button.



Status Report Page

- **Notes**

The evaluation comment cannot exceed 3000 characters.

Comment on a Status Report (Secretary of Technology)

- **Overview**

The Secretary of Technology can view and comment on status reports evaluated by the sponsoring Secretariat.

- **How to launch the function**

This function is selected from either the Quick Launch bar or the Project Action drop down list on the Project List page.

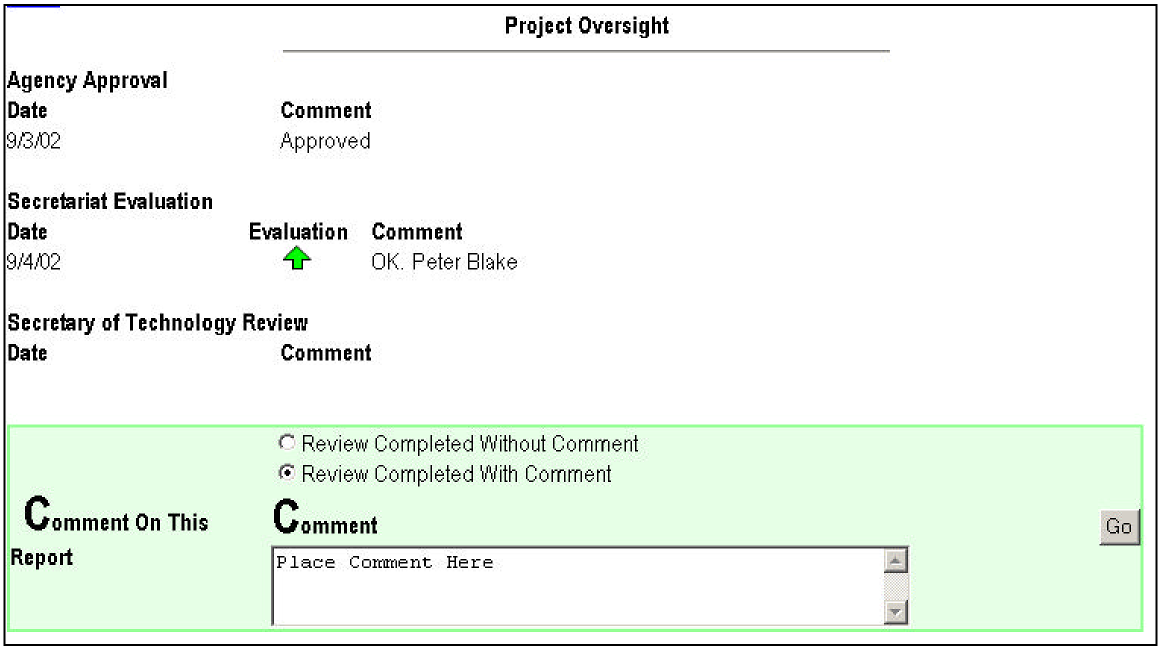
- **How to perform the function**

To use the Quick Launch bar:
- Select "Comment on a Status Report" from the first drop down box
- Select the project from the second drop down box
- Click GO

To use the Project Action box:
- Scroll or page to the project of interest
- Select "Comment on a Status Report" from the Project Action drop down box
- Click GO

From the Status Report List page, under the Reporting Period column, click the status report to view and comment; typically the most recently dated entry.

Scroll to the bottom of the Status Report page. Click "Review Completed Without Comment" to review the status report without a comment, or click "Review Completed With Comment", input a comment, and click the "Go" button on the right.



Status Report Page

- **Notes**

The comment cannot exceed 3000 characters.
Once the status report has been reviewed, an automatic email is sent to the Project Manager, Agency Head/Sponsor, and the Oversight Chair (Sponsoring Secretariat) of the project alerting them that the Secretary of Technology has reviewed the status report.

Appendices

Appendix A: Key Status Indicator Definitions

1. Is the project on track to meet the planned performance requirements as reflected in the measures of success?

- Yes
- Warning, at least one measure of success may not be achieved.
- Problem, at least one measure of success will likely not be achieved.

2. Are the costs within the planned budget?

– Yes
– Warning, actual project-to-date cost is less than 10% over planned project-to-date cost.
– Problem, actual project-to-date cost is 10% or more over planned project-to-date cost.

3. Is the project on schedule?

– Yes
– Warning, the project is less than 10% behind schedule.
– Problem, the project is 10% or more behind schedule.

4.Does the project remain within the approved scope?

– Yes
– Warning, the scope has changed, but the change does not alter the cost or schedule baselines.
– Problem, the scope has changed and the change impacts the cost or schedule baselines.

5.Is the project being managed to minimize or mitigate the identified risks?

– Yes
– Warning, the mitigating strategy for at least one risk has yet to effectively manage the risk.
– Problem, the mitigating strategy for at least one risk has failed to manage the risk.

<u>Current Overall Project Status Indicator</u> (Determined by the Oversight Committee)

– On track.
– Warning, consider corrective action or monitor previous corrective action.
– Problem, immediate corrective action required.

(Indicators derived from the Commonwealth Major IT Project Status Report Dashboard)

Appendix B: Email Notification

Purpose of Email	Emailed To	Action Emailed On
To alert all Project Managers their status report is due by a certain date.	All Project Managers	Emailed on first business day of the month.
To alert Agency Head/Sponsor their status report has been completed.	Agency Head/Sponsor for specific project	Emailed once the Project Manager marks the status report complete.
To alert Sponsoring Secretariat their status report has been approved.	Sponsoring Secretariat for specific project	Emailed once the Agency Head/Sponsor approves the status report.
To alert the Project Manager, Agency Head/Sponsor, and Sponsoring Secretariat of the review by the Secretary of Technology.	Project Manager, Agency Head/Sponsor, and Sponsoring Secretariat for specific project.	Emailed once the Secretary of Technology reviews the status report.
To Project Manager, Agency Head/Sponsor, and Sponsoring Secretariat to alert that the status report has not been evaluated by the due date.	All project members whose status report has not been evaluated by the due date.	1 day after the due date of status report evaluations.

Appendix C: Reports

The Reports section is accessible via the top navigation. These are initial reports and may be changed in the future.

Name:	Executive Reports
Description:	A report displaying the number of green, yellows, reds, and the EAC (Estimate At Completion) of each project grouped by agency, secretariats, with a total summary count at the bottom of the report.
Availability:	This report is available to the Secretary of Technology, and Sponsoring Secretariat user classes. The list of agencies is limited to the list of agencies the user class has access to.
Name:	Status Reporting - Progress
Description:	Displays the status of status reports. It lists whether the status report has been created, approved, evaluated, and reviewed.
Availability:	This report is available to the Secretary of Technology, Sponsoring Secretariats, and Agency Heads/Sponsors user classes. The list of projects is limited to the list of projects the user class has access to.